12-Day Turnaround with Chris Jarvis

Day 11 – Giraffe Assessment Tool

Part a – How to use these tools

Every prospect is going to ask three questions of themselves before hiring you.

1. Is he/she capable of handling my situation?
2. Do I believe he/she understands my situation, my concerns, my goals, and my worries enough to give me a solution that will work for me?
3. Do I trust him/her? (Will he/she put my interests above his own? Do I believe he/she will follow through?)

The answer to the first question may come from your education, your credentials, or your experience. These aspects give prospects a belief that you should be able to handle certain kinds of scenarios. If you don't have a specific education, credential, or impressive amount of experience, that's okay. The more powerful way to prove you can do something is to have someone you have helped be able to tell a story.

Unsure that a testimonial is more powerful than credentials?

The last time you were looking for a restaurant in a new town, what did you do? Did you read the local restaurants' websites to see what they said about themselves? If you are like most Americans, you went to Yelp or Urban Spoon or Open Table and read what other people (just like you) said about the restaurant.

Question 1 will take care of itself if you secure valuable testimonials. If you don't have any, then offer to help someone for free. Get some experience by piggy backing on someone else's experience. (That's what I did – a story for another day.)

The second question illustrates that they need to believe you understand them. How do you do this? I ask a lot of questions. I start with questions about them. I ask questions about their family, their childhood, their parents. I ask questions about their goals and problems. I ask them why this problem is bothering them. I ask what would happen if they didn't address this problem. I ask what they would like to accomplish from addressing it now.

It is very important to ask them about their experiences with agents, brokers, accountants and attorneys. Ask which ones were great, and why. Ask which were not so great, and why. This information will tell you what they want from you, what they don't want from you, how they want it, and how they don't want it. This is invaluable because it shows that you want to know about them – not just about sales opportunities.

The third question is about trust. You have to earn trust. You can't make someone trust you, but you can give them reasons to want to trust you. I do this three ways:

1. I share information, good and bad, about everything the client should consider. This will include things that I may be able to do for them and things that I will have to refer out for them. I leave information with them so they can see that I want them to discover the solution on their own.

2. I am overly sensitive to self-promotion. I share that there are some things that I am discussing that may result in a commission for me. I over-disclose the commission potential, along with size of the commission. I do this so that they see I am not hiding anything.

3. I offer to speak with any and all of their other advisors. I want to make sure that anything I do fits with everything else they are doing – or considering doing. I also suggest that they may feel more comfortable with the decision to work with me if their other advisors recommend me as well.

4. I offer to work for a fee, instead of commissions. I tell them that it is more important that I be invited to join their inner circle of advisors than it is to make a commission. If they would rather have an unbiased advisor who has no vested interest in any particular product, I am happy to play that role.

You may be a relatively new agent. You might be a seasoned agent, but you have focused on product sales your whole career. Transitioning to solutions-based selling may seem weird, uncomfortable. or even scary.

To help you overcome this, I have created a 60-question assessment form. You can walk through this with prospects or clients. You can also send it to them to complete prior to meeting with you. The good news is that these are all YES / NO answers, so clients can get through it very quickly.

More importantly than offering you the questionnaire, I have also offered you the "teacher's guide." When they send you back their answers, you will be able to check it against the teacher's guide and bring up important discussion topics. This tool will not only help you start a meaningful dialogue with new prospects, but it will also help you identify countless new opportunities with your existing clients.

The next two documents are the questionnaire for your prospects and the "teacher's guide" that will help you initiate discussions with clients.

If you like how well this is going and want to supercharge this by automating it, we can help you customize an electronic version of this survey for your clients. If you want to help clients learn for themselves and have them decide to buy products as part of their own self-discovery (and save you the time of having to explain every possible product), we can also help you create custom books (from excerpts of previous bestselling books) for your clients that describe every tool that is recommended from this assessment.

Contact us at www.TheChrisJarvis.com for more information.